

RESOLUTION NO. 2017-22

A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF KEY BISCAIYNE, FLORIDA, APPROVING REDMARK TECHNOLOGIES, LLC FOR THE LICENSING, INSTALLATION AND MAINTENANCE OF AN ACCELA SOFTWARE SYSTEM FOR THE BUILDING, ZONING AND PLANNING DEPARTMENT; PROVIDING FOR A WAIVER OF COMPETITIVE BIDDING; AUTHORIZING THE VILLAGE MANAGER TO NEGOTIATE AN AGREEMENT CONSISTENT WITH AND SUBSTANTIALLY IN ACCORDANCE THE TERMS SET FORTH IN THE PROPOSAL AND STATEMENT OF WORK ATTACHED AS EXHIBIT “A-1;” AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Village of Key Biscayne (the “Village”) currently uses Accela software for its building, zoning and planning department; and

WHEREAS, after review of other software systems, the Village Staff has recommended that the Village upgrade its current Accela software system to Accela’s Civic Platform, which includes the Accela Citizen Access, Accela GIS, and Accela Mobile Office applications (the “Software System”); and

WHEREAS, Redmark Technologies, LLC is the only local authorized reseller of Accela software systems to the small and medium government market (the “Redmark”); and

WHEREAS, the Village Council desires to enter into an agreement with Redmark for the licensing, installation, and maintenance and support services for the Software System, and authorizes the Village Manager to negotiate an agreement with Redmark consistent with and substantially in accordance with the Proposal and Statement of Work attached hereto as Exhibit “A-1;” and

WHEREAS, the Village Council finds that this Resolution is in the best interest and welfare of the residents of the Village.

NOW, THEREFORE, BE IT RESOLVED BY THE VILLAGE COUNCIL OF THE

VILLAGE OF KEY BISCAYNE, FLORIDA, AS FOLLOWS:

Section 1. Recitals Adopted. Each of the above stated recitals are hereby adopted, confirmed and incorporated herein.

Section 2. Redmark Approved. The Village Council hereby approves Redmark for the licensing, installation, and maintenance and support services for the Software System.

Section 3. Waiver of Competitive Bidding. The Village Council hereby finds that, pursuant to Section 2-85 of the Village Code of Ordinances, it is impractical to apply the competitive bidding procedures within the Village Code, given that the Village currently utilizes the Accela software and Redmark is the only local authorized reseller of the Software System.

Section 4. Village Manager Authorized. The Village Manager is hereby authorized to negotiate an agreement with Redmark, consistent with and substantially in accordance with the Proposal and Statement of Work attached hereto as Exhibit "A-1," for the licensing, installation, and maintenance and support services for the Software System, subject to approval as to form, content, and legal sufficiency by the Village Attorney.

Section 5. Effective Date. This Resolution shall be effective immediately upon adoption.

PASSED AND ADOPTED this 9th day of May, 2017.


MAYOR MAYRA PEÑA LINDSAY

ATTEST:


CONCHITA H. ALVAREZ, MMC, VILLAGE CLERK

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY


VILLAGE ATTORNEY



Exhibit A



Order Form for: KEY BISCAYNE FL
Quote Number: Q-11353-1
Date: April 11, 2017
Valid Until: June 15, 2017
Subscription Agreement: Version 052615a
Proposed By: WALTER CHAVEZ

Address Information

Bill To:

Village of Key Biscayne
Attn: Jud Kurlancheek
88 W. McIntyre St, Suite 120
Key Biscayne, FL 33149

Billing email:
Billing Phone:

Ship To:

Village of Key Biscayne
Attn: Jud Kurlancheek
88 W. McIntyre St, Suite 120
Key Biscayne, FL 33149

Attn: Michael Mila
Email: mmila@keybiscayne.fl.gov

Payment Terms and Conditions

Service Start Date: Upon Delivery
Service End Date: 12 months form start date
Number of Annual Terms: 1
Billing Frequency: Upon signature

Payment Terms: Net 30
Billing Method:
PO Required: No
PO Number: N/A

Products and Services

Part #	Description	QTY	Unit Price	Net Price
SS10APFMSAS0001	Accela Civic Platform	17	\$ 2,388.00	\$ 40,596.00
SS10AACAPOP0001	Accela Citizen Access	12,637	\$ 0.03	\$ 379.11
Annual Subscription Total				\$40,975.11

Other Terms and Conditions

- Offer to purchase becomes a binding commitment upon acceptance by Customer, and is not subject to the issuance of any further purchase orders, confirmations or other events.
- The terms and conditions of the Order Form take Precedence over any conflicting terms to the Subscription Terms version 52615a. No modification or amendment of this Order Form will be effective unless it is described in writing and signed by the Parties.
- Annual Subscription fees do not include hardware or equipment. Please contact your selected hardware vendor for additional hardware or software costs.
- Section #4 of the Accela Subscription Terms and Conditions is deleted in its entirety and replaced with the following:

Subscription terms are twelve (12) calendar months in duration. At the end of Customer's subscription term or, if a multi-term subscription is indicated on the Order, the last of Customer's subscription terms, Customer's subscription will renew for an additional term. The per-unit pricing during said additional term will be the same as the prior term's annual fees unless Accela notifies Customer otherwise not less than sixty (60) calendar days prior to the end of said prior term. Any price increase will be effective at the start of the renewal term. No such price increase will exceed three percent (3%) of the prior term's annual pricing. Customer may opt-out from said automatic renewal by providing written notice to Accela or RedMark not less than sixty (60) calendar days prior to the Service Date anniversary which begins the renewal term. During said sixty-day period, Customer may decrease the number of users for which it has subscribed; said decrease will be effective during the next subscription term. Customer may not decrease its number of subscribed users at any other time during a subscription term. At any time during a subscription term, Customer may increase its number of subscribed users by submitting an order to Accela and paying the fees associated with the increase. Such fees will be subscription term, rounded-up to the nearest full month.
- If the Agency requires additional on-site assistance, a separate estimate and Statement of Work will be provided.

Alternate Terms Disclaimed: The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

Village of Key Biscayne

RedMark Technologies, LLC.

Signature_____

Signature_____

Name_____

Name_____

Title_____

Title_____

Date_____

Date_____

Fax: Attn: Walter Chavez at (561) 892-8022

Email: lrlos@redmarktech.com

Mail To: RedMark Technologies, LLC.
2385 NW Executive Center Dr.
Suite 100
Boca Raton, FL 33431

THANK YOU FOR YOUR BUSINESS!

Statement of Work

Village of Key Biscayne, FL

April 18, 2017

Version 1.6

RedMark Technologies, LLC.
2385 NW Executive Center Drive
Suite 100
Boca Raton, FL 33431
Tel: 561-210-5141
Fax: 561-892-8022

TABLE OF CONTENTS

TABLE OF CONTENTS	2
DOCUMENT CONTROL	4
OVERVIEW	5
SERVICES DESCRIPTION	5
PURPOSE	5
PROJECT TIMELINE	5
PROJECT MANAGEMENT	6
CRITICAL SUCCESS FACTORS	6
WORK DESCRIPTION	7
DELIVERABLE 1: PROJECT INITIATION	7
DELIVERABLE 2: ACCELA CIVIC PLATFORM SYSTEM SETUP	8
DELIVERABLE 3: TRANSFER AND INSTALL SMALL MEDIUM GOVERNMENT (SMG) MARKET CONFIGURATION	9
DELIVERABLE 4: ADDITIONAL CONFIGURATION	10
DELIVERABLE 5: ADDRESS, PARCEL AND OWNERSHIP (APO) DATA CONVERSION	10
DELIVERABLE 6: HISTORICAL DATA CONVERSION	11
SYSTEM INTERFACES	12
DELIVERABLE 7: PAYMENT PROCESSOR INTERFACE	12
DELIVERABLE 8: BUSINESS PROCESS VALIDATION AND AUTOMATION	13
REPORTS	14
DELIVERABLE 9: REPORT SPECIFICATIONS	14
DELIVERABLE 10: REPORT DEVELOPMENT	15
DELIVERABLE 11: ACCELA GIS CONFIGURATION	16
DELIVERABLE 12: ACCELA CITIZEN ACCESS CONFIGURATION	17
DELIVERABLE 13: ACCELA MOBILE OFFICE CONFIGURATION	17
DELIVERABLE 14: ELECTRONIC DOCUMENT REVIEW CONFIGURATION	18
DELIVERABLE 15: ADMINISTRATIVE AND TECHNICAL TRAINING	19
DELIVERABLE 16: DAILY USER TRAINING	20
DELIVERABLE 17: USER ACCEPTANCE TESTING (UAT)	20
DELIVERABLE 18: PRODUCTION SUPPORT	21
DELIVERABLE 19: POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC	22
PAYMENT SCHEDULE	24
EXPENSES	24
CONTRACT SUM	24
PROJECTS PUT ON HOLD	25
CHANGE ORDERS	25
EXPIRATION	25
PROJECT ASSUMPTIONS	25
PROJECT RESOURCES AND LOCATION OF WORK	26



WORK LOCATION.....	26
AGENCY RESOURCES.....	27
REDMARK RESOURCES.....	28
 ACCEPTANCE	 30
 APPENDIX A - ACCELA IMPLEMENTATION METHODOLOGY	 31
IMPLEMENTATION LIFE CYCLE	31
INITIATION.....	31
TO-BE ANALYSIS.....	31
SOLUTION FOUNDATION.....	32
BUILD	32
READINESS.....	32
DEPLOY	32
 APPENDIX B - DATA CONVERSION ASSUMPTIONS	 34
GENERAL INFORMATION AND REQUIREMENTS FOR HISTORICAL CONVERSIONS	34
DATA CONVERSION ASSUMPTIONS	34
STANDARD DOCUMENT MIGRATION	35
 APPENDIX C - SAMPLE DELIVERABLES ACCEPTANCE FORM.....	 36

DOCUMENT CONTROL

Date	Author	Version	Change Reference
12/28/2016	Lilian Rios	1.0	Initial draft.
01/03/2016	Walter Chavez	1.1	Review and minor changes.
02/13/2017	W. Chavez	1.2	Updated scope per agency request.
02/27/2017	L. Rios	1.3	Added payment table.
04/06/2017	L. Arango	1.4	Edits by Village attorney.
04/10/2017	W. Chavez	1.5	Accepted changes and modified payment table.
04/11/2017	W. Chavez	1.6	Final document.

OVERVIEW

Congratulations on your selection of Accela, Inc., and their enterprise suite of industry leading software. The implementation of Accela products is designed specifically to meet the specific requirements and budget defined by Village of Key Biscayne, FL ("Agency"). RedMark Technologies ("RedMark"), as the only implementation partner currently allowed to sell software into Accela's Small Medium Government (SMG) market, will utilize Accela's best practice Implementation Methodology, based on previous client interactions and industry knowledge, to promote a successful project that will meet the Agency's objectives. The following Statement of Work will detail how RedMark Services will implement the software you have purchased, including the major milestones and deliverables that will ensure your success.

RedMark is committed to providing a superior software solution, and deployment of the software, for the current and future needs of the Agency. RedMark will work with Agency staff to optimize Accela's portfolio of software, best practices, and customer experience to enable the Agency to successfully deploy its Accela Civic Platform software and meet its functionality, timing and cost requirements. This Statement of Work ("SOW") dated April 18, 2017 sets forth a scope and definition of the consulting/professional services, work and/or project (collectively, the "Services") to be provided by RedMark to Agency.

SERVICES DESCRIPTION

PURPOSE

The purpose of this document is to detail the specific activities, deliverables, roles and responsibilities, and acceptance criteria that comprise the implementation of the Accela Civic Platform with the Accela Citizen Access, Accela GIS, and Accela Mobile Office for the Agency. RedMark will provide professional services for implementation of the above modules and products per the Work Description section detailed henceforth. The following Agency departments comprise the organization scope of the implementation described herein:

- Building
- Planning
- Record Research
- Permit Application and Issuance
- License Renewals
- Inspection Request Entry
- Inspection Results Research
- Status tracking
- Code Enforcement
- Public Works
- Business Tax Receipts

Thereafter, after the implementation phase, RedMark will provide support services pursuant to the Accela Subscriptions Terms and Conditions.

PROJECT TIMELINE

The term of this project is 11 months (or sooner if all services are completed as set forth in this SOW prior to the 11 month term) during the implementation phase, and thereafter support services to be provided pursuant to the Accela Subscription Terms and Conditions. If additional implementation services, modules or products are required or requested by the Agency, the Agency's Village' Manager may extend or renew the implementation term of the SOW

for an additional one (1) year term, and such extension for additional services shall be evidenced by a Change Order to this SOW and the Agreement with the Agency.

Any delays (e.g., Change in staff level/availability, missed deadlines) in the Project Timeline which by mutual agreement were created by the Agency will result in an increase in the duration of the project will require a Change Order to reimburse RedMark for the additional costs associated with the delay, including but not limited to additional hours for project management, deliverable development and review.

Upon execution of this SOW, the parties will collaborate to determine a start date for Services to be rendered. Upon initiation of these Services, the RedMark Project Manager will work with the Agency to collaboratively define a baseline project schedule. Given the fact that project schedules are working documents that change over the course of the project, the RedMark Project Manager will work closely with Agency to update, monitor, agree, and communicate any modifications.

PROJECT MANAGEMENT

RedMark will provide a full time project manager for services throughout the implementation in order to plan and monitor execution of the project in accordance with deliverables outlined in the Statement of Work. To support the implementation of the Accela Civic Platform software at the Agency, RedMark will provide Project Management services throughout the project. Generally these services include the following:

- Project plan management using Microsoft Project,
- Project document management using Dropbox or Microsoft SharePoint project site,
- Issue log management and escalation,
- Status reporting,
- Change order management,
- Project workspace management,
- Resource management,
- Executive project oversight and quality assurance.

By mutual agreement, some project management tasks may be shared between the RedMark Project Manager and the Agency Project Manager.

CRITICAL SUCCESS FACTORS

In order to successfully execute the services described herein, there are several critical success factors for the project that must be closely monitored and managed by the stakeholders. These factors are critical in setting expectations between the Agency and RedMark, identifying and monitoring project risks, and promoting strong project communication.

- **Knowledge Transfer** – While RedMark cannot guarantee specific expertise for Agency staff as a result of participating in the project, RedMark will make all reasonable efforts to transfer knowledge to the Agency. It is critical that Agency personnel participate in the analysis, configuration and deployment of Accela Civic Platform in order to transfer knowledge to the Agency. Once Post Production assistance tasks are completed by RedMark Services, the Agency assumes all day-to-day operations of Accela Civic Platform outside of the Support and Maintenance Agreement. The Service and Maintenance Agreement does not cover any Agency manipulation of implemented scripts, reports, interfaces and adapters. Key knowledge transfer areas include:
 - Configuration
 - Scripting
 - Batch scripts

- Interfaces
 - Event Management Scripts
 - Reports and Forms
- **Dedicated Agency Participation** – RedMark fully understands that Agency staff members have daily responsibilities that will compete with the amount of time that can be dedicated to the Accela Civic Platform implementation project. However, it is critical that the Agency acknowledges that its staff must be actively involved throughout the entire duration of Services as defined in the Project Plan. RedMark will communicate insufficient participation of Agency and RedMark resources through Project Status Reports with real and potential impacts to the project timeline. RedMark will work the project sponsors and department leaders to determine appropriate team member involvement. This could range from full-time during early analysis meetings to part-time during the technical implementation phase.
- **Deliverable Acceptance Process** - Implementation services for the above products are formalized through the deliverables defined in this document. Upon completion of each deliverable according to the acceptance criteria defined herein, RedMark will provide the Agency with a Deliverable Acceptance Form to formalize acceptance and completion. The Deliverable Acceptance Form is subsequently signed by the appropriate Agency contact, as defined in the Project Charter, and faxed/scanned/emailed or hand delivered to RedMark. Please refer to Appendix C to view a sample Deliverable Acceptance Form. RedMark respectfully requests prompt attention to the processing of all Deliverable Acceptance Forms, as adherence to this timely process directly impacts the ability to complete the project in the desired timeframe. In order to prevent delays in the project schedule, for all Deliverables where no response time is specifically identified in the SOW, a three (3) business day acceptance period is assumed.
- **Accela Implementation Methodology** – Accela's successful, proven, implementation methodology is crucial to the project success. Accela's software and customer base is a niche market and as such the implementation methodology may differ from other consulting firms and software packages. It is imperative to project success that the Agency is willing to adhere/adopt to the Accela Implementation Methodology.

WORK DESCRIPTION

The following section describes the specific activities and tasks that will be executed to meet the business objectives and business requirements of the Agency. In support of the implementation effort as described above, RedMark will provide the following detailed implementation services. For each deliverable, a description is provided as well as criteria for acceptance of the deliverable.

DELIVERABLE 1: PROJECT INITIATION

Project initiation is an opportunity to ensure the project starts in a well-organized, structured fashion while re-confirming the Agency and RedMark expectations regarding the implementation. This Deliverable is comprised of project planning activities, core project management documents and templates and the first on-site meeting conducted between the Agency and RedMark after the signing of the Statement of Work.

In conjunction with the Agency representatives, RedMark will perform the following tasks:

- Finalize staffing for the project teams. Guidelines and recommendations for the Agency project staffing are addressed in the Project Staffing section of this document.
- Conduct a formal onsite Kickoff meeting. The objective of this meeting is to review the purpose of the project and discuss the project scope, roles and responsibilities, deliverables, and timeline.
- Establish Communication Plan and project logistics including escalation, status reporting, issue/risk management, work locations, etc.

- Establish schedule of Steering Committee meetings.
- Review and agree on Project Status Report Template format.
- Finalize and document formal deliverable signoff procedures, identify team members that will be responsible for signoff from the Agency and RedMark.
- Review infrastructure requirements and preparation (with designated Agency technical staff).
- Finalize an integrated project plan that includes resource allocation for all tasks (in cooperation with the Agency Project Manager).
- Develop a Project Charter that defines how the project will be governed, including a detailed escalation plan.
- Create the project (SharePoint, Dropbox or similar) site and load all standard, current documentation.

The Project Kickoff Meeting includes a formal presentation by the project team to review project objectives, methodology, timeline, roles and responsibilities, risks, and other key project elements with project stakeholders.

In terms of specific output, the following will be executed for this deliverable:

- Project Charter
- Baseline Project Plan
- Project Status Report Template
- Project SharePoint Site
- Project Kickoff Presentation

RedMark Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Coordinate project planning activities.
- Communicate the Accela Implementation Methodology that will be used by RedMark to deliver Services.
- Complete Baseline Project Plan, Project Status Report Template, and Project Kickoff Presentation deliverables with input from appropriate Agency resources.

Agency Responsibilities:

- Identify and set expectations with key resources and subject matter experts for ongoing participation in the project.
- Provide timely and appropriate responses to RedMark's requests for project planning input and meeting logistics requests.
- Provide meeting facilities for Project Kickoff and other onsite activities.
- Include Project Sponsor in Project Kickoff Meeting.

Acceptance Criteria:

- Review and acceptance of the Project Status Report Template
- Review and acceptance of the Baseline Project Plan
- Review and acceptance of the Project Charter
- Completion of the Project Kickoff Meeting
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 2: ACCELA CIVIC PLATFORM SYSTEM SETUP

This Deliverable is defined as the setup of the Accela Civic Platform software in the Accela Cloud environment such that Agency can log into the system and verify software is available.

In terms of specific output, the following will be executed for this deliverable:

- Setup of the Accela Civic Platform software, development (DEV) and production (TEST) environments, in the Accela Cloud
- Demonstration of the operational Accela Civic Platform environment

Specifically, RedMark will perform the following tasks within the support environment:

- Perform a remote system check of the system
- Demonstrate that the Accela Civic Platform applications are operational
- Ensure all tasks are completed on RedMark's side for VPN tunnel with Agency for any necessary integration.

RedMark Responsibilities:

- Provide timely and appropriate responses to Agency request for information
- Consult with Agency resources to provide technical input and answer technical questions related to the requirements for Accela Civic Platform.

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark's request for information
- Make available the appropriate Agency users to validate system is setup and available.
- Complete tasks related to setup of VPN tunnel to Accela environment.

Acceptance Criteria:

- Confirmation of ability to log into the Accela Civic Platform software.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 3: TRANSFER AND INSTALL SMALL MEDIUM GOVERNMENT (SMG) MARKET CONFIGURATION

This Deliverable is defined as the porting and as-is installation of the configuration of the Accela environment for Small Medium Government (SMG) market configuration (similar to the system configuration designed and currently being installed or implemented at the City of Weston, FL), to the Accela hosted cloud environment set up as part of Deliverable 2 – Accela Civic Platform System Setup.

In terms of specific output, the following will be executed for this deliverable:

- Installation of a Small Medium Government (SMG) market configuration (similar to the system configuration designed and currently being installed or implemented at the City of Weston, FL), into Accela's development (DEV) environment, in the Accela Cloud
- Demonstration of the operational Accela Civic Platform environment with the City of Weston Configuration

Specifically, RedMark will perform the following tasks within the support environment:

- Perform a remote system check of the system
- Demonstrate that the Accela Civic Platform applications are operational with the City of Weston's configuration
- Ensure all tasks are completed on RedMark's side for VPN tunnel with Agency for any necessary integration.

RedMark Responsibilities:

- Provide timely and appropriate responses to Agency request for information

- Consult with Agency resources to provide technical input and answer technical questions related to the requirements for Accela Civic Platform.

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark's request for information
- Make available the appropriate Agency users to validate system is setup and available
- Complete tasks related to setup of VPN tunnel to Accela environment.

Acceptance Criteria:

- Confirmation of ability to log into the Accela Civic Platform software and view City of Weston's configuration.

DELIVERABLE 4: ADDITIONAL CONFIGURATION

RedMark will provide professional services for additional support to modify the Small Medium Government (SMG) market configuration (similar to the system configuration designed and currently being installed or implemented at the City of Weston, FL), to meet the specific needs of the Agency as directed by Agency staff.

In terms of specific output, the following will be executed for this deliverable:

- Up to 160 hours of additional support for analysis and configuration changes to City of Weston configuration

RedMark Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Configure the foundational components as defined by the Agency.

Agency Responsibilities

- Provide timely and appropriate responses to RedMark's request for information.
- Make available the appropriate Agency key users and content experts to participate in creating the system in an effort to learn about the system.
- Work with RedMark to verify that the system meets the foundational requirements as defined by Agency staff.
- The Agency will test the system for purposes of validating the configuration.

Acceptance Criteria:

- Review and approve that the Accela Civic Platform Solution Foundation meets the requirements documented by Agency staff.
- Agency will have 5 business days to conduct initial review of the Solution Foundation. If no changes or comments are requested within the 5 days, the milestone is considered approved by the Agency. Upon delivery of initial feedback, RedMark will complete the necessary changes and updates. The second and final review will have 5 business days for acceptance.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 5: ADDRESS, PARCEL AND OWNERSHIP (APO) DATA CONVERSION

This Deliverable includes conversion of Agency Address, Parcel, and Ownership (APO) data to Accela Civic Platform. RedMark leverages a standardized data conversion process for APO data sets and will deliver the standard APO specifications and file templates to be used by the Agency in preparing the data for conversion. The Agency will identify a source for data to update the address, parcel and owner information within the Agency. Data must be provided in Accela's standard format, and RedMark and Agency business and technical experts will work together to



map the source data to the Accela database. After mapping is done, the RedMark conversion team will develop the conversion program that will populate the Accela system with the appropriate data.

In terms of specific output, the following will be executed for this deliverable:

- Migrated APO data into Accela Civic Platform testing database environment.

RedMark Responsibilities:

- Migrate data provided by the Agency into the Agency's Accela Civic Platform testing database environment.
- Load data from original source(s) into the Accela standard staging tables.
-

Agency Responsibilities:

- Identify data accuracy / quality issues and resolve them (data scrubbing).
- Provide APO data in the format(s) specified by the standard APO documentation that RedMark will provide.
- Allocate the time for qualified business and technical experts for the RedMark-led data-mapping sessions that are critical to the project success.
- Assist in the data-mapping process.
- Allocate the time for qualified personnel to test the conversion for acceptance to ensure that the data is converted successfully.

Acceptance Criteria:

- Confirmation that APO data has been converted to Accela Civic Platform testing environment.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 6: HISTORICAL DATA CONVERSION

Upon Agency approval of the **Permits Plus** Conversion Specifications document, RedMark will provide a program(s) to migrate appropriate historical data into Accela Civic Platform. This conversion **includes historical permits data as well as Licensed Professionals data**, as both sets of data are managed by the Agency in the Permits Plus environment.

In terms of specific output, the following will be executed for this deliverable:

- Completion of migrated data into Accela Civic Platform development environment.

RedMark Responsibilities:

- Provide a program to migrate historical data into Accela's Civic Platform cloud DEV environment.
- Data conversion will include up to three (3) conversion loads for client testing.
- Validate the successful completion of the migration of historical data into Accela's Civic Platform cloud DEV environment.

Agency Responsibilities:

- Providing the legacy data source in an accepted format.
- Assist in the execution of the data conversion program and provide access to environments as needed.
- Provide resources to validate the conversion statistics and the quality of the data converted into Accela Civic Platform.

Acceptance Criteria:

- Historical data has been converted to Accela Civic Platform DEV environment according to the Data Conversion Mapping document.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

Acceptance Review Period:

- Five (5) business days total

SYSTEM INTERFACES

The following system interfaces are in scope for this project:

- Financial Interface
- Payment Processor Interface

For each interface, the RedMark technical lead will work together with Agency's technical lead and business leads to document functional and technical requirements of the interface in an Interface Specifications Document. Interface development begins upon written approval of the specifications. It is expected all interfaces will use Accela's GovXML, web services or batch engine. No custom or third party integration tool will be used to accomplish input or output of data to/from the Accela system. In other words, data coming into Accela and data coming from Accela will use the existing integration technology. Agency responsibility includes obtaining permission for level/type of integration from appropriate application owners (including on premises or cloud/hosted, etc.). Further, Agency will ensure that RedMark resources have access to a Dev or Test version of the 3rd party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3rd party system.

DELIVERABLE 7: PAYMENT PROCESSOR INTERFACE

RedMark will develop an interface between Accela Civic Platform and an Agency provided adaptor for Electronic Payments. Specifically, RedMark will utilize/update the standard E-Payment adaptor to the [system] for **Accela Civic Platform (Back-Office/Counter)** and **ACA (Accela Citizen Access)** payment processing. It is assumed that all departments will be using the same version of [system] for payment processing.

In terms of specific output, the following will be executed for this deliverable:

- Interface Specifications Document
- Demonstration of operational interface between Accela Civic Platform and [system] in the development environment.

RedMark Responsibilities:

- Work with Agency staff to develop interface specifications during configuration.
- Use an Accela web service or other tool to implement interface functionality based on the specifications.
- Assist the Agency with testing and debugging of the interface.

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark's request for information.
- Allocate the time for qualified business and technical experts for the testing sessions that are critical to the project success.
- Identify and coordinate any related tools used to implement the interface (3rd party or in-house development).
- Assist in the interface specification development and data mapping process.
- Review and approve the interface specification documents.

- Allocate the time for qualified personnel to test the interface for acceptance to ensure that the data populates successfully according to the interface specification documents.

Acceptance Criteria:

- Review and approval of the Interface Specification document.
- Demonstration of the interface meeting the specific requirements detailed on the interface specifications document. The Agency will not unreasonably withhold acceptance if the Agency opts to complete the task using Agency or third party resources.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 8: BUSINESS PROCESS VALIDATION AND AUTOMATION

During the configuration analysis phase of the implementation project, RedMark will identify opportunities to supplement the Accela Civic Platform base functionality via Event Manager Script Engine (EMSE) script development. RedMark will work with key Agency project stakeholders to identify the business rules/processes to be automated. RedMark will work with Agency to identify desired EMSE functionality, and subsequently will help prioritize the scripting needs to be developed by RedMark, with Agency direction. The scripts developed by RedMark can be used as models whereby agency staff can develop and modify additional EMSE scripts as needed.

Representative examples of business processes that could be automated by a script listed below. Note that the below list is an example list only and not a list of the actual script(s) that will be developed for the project.

- Closing workflows based on inspection results
 - Use Case: Final Inspection is complete, update workflow;
- Automatic assessment of complex fee calculations
 - Use Case: Auto fee calculation, assessment, and invoicing upon application submittal;
- Increment a date based on workflow status change
 - Use Case: Expiration on Permit is made current every time a workflow is updated;
- Preventing inspections based on various criteria
 - Use Case: Depending on workflow / application status, do not allow an inspection to take place.

Prior to the development of a script, the Agency will approve a design specification document that will be created jointly by the Agency and RedMark. The approved document will be used as a basis for determining completion and approval of the deliverable. An initial estimate of 80 hours has been allocated for Business Process Validation and Automation. Additional scripts required by the Agency can be added through a Change Order.

In terms of specific output, the following will be executed for this deliverable:

- Prioritized list of requirements that require Automation
- Specification documents for each required Automation
- Demonstration of completed Automations in development or test environments per the specifications document(s)

RedMark Responsibilities:

- Work with Agency staff to identify potential uses of EMSE scripting.
- Assist with development of list of desired EMSE functionality.
- Aid the Agency in prioritizing which scripts will be developed by RedMark.
- Develop EMSE scripts based on the specifications.
- Demonstrate functionality of scripts per specifications.

Agency Responsibilities:

- Allocate the time for qualified business and technical experts for the script requirements sessions that are critical to the project success.
- Identify resources that will learn EMSE scripting tools and approaches for ongoing maintenance.
- Prioritize desired EMSE functionality to determine which scripts RedMark will develop.
- Provide timely and appropriate responses to RedMark's request for information.
- Verify the Event Script Specification meets the intended business requirement.
- Allocate the time for qualified personnel to test the script for acceptance.
- Ensure that the data populates successfully according to the script requirements document.

Acceptance Criteria:

- Review and acceptance of design document with written sign-off from the Agency.
- Demonstrate a developed script within the system.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C).

REPORTS

Reports are defined as anything that can be printed from the system, including but not limited to, reports, forms, documents, notices, and letters that the Agency wishes to print as identified during configuration analysis. The Configuration Document will define the reports and documents that are required by the Agency to effectively use Accela Civic Platform. These reports will be broken down by level of effort and identified in the configuration document. It is expected that, after the appropriate training on the database and the selected report writing tool is completed, Agency personnel will be able to handle additional and future report requirements. Reports are classified by level of effort: high, medium, and low. High is defined as a report containing significant calculation and/or extensive detail and number of fields – for example a financial statistical report or complex permit. The majority of reports require a 'medium' level of effort, which is defined as a report displaying non-calculated and minimal calculated data fields. Reports with a low level of effort are typically letters or notices that contain contact information and basic application data.

These reports can be developed using the integral Accela Report Writer included with Accela Civic Platform, Microsoft Report Service (SRS) or Crystal Reports XI Server at the Agency's discretion. These custom reports, whether developed with Accela Report Writer, SRS or Crystal Reports, will be deployed in the Report Manager for use within Accela Civic Platform.

DELIVERABLE 9: REPORT SPECIFICATIONS

RedMark will develop documents/letters/reports from those identified by the Agency as required for the new system.

RedMark and Agency have agreed that RedMark will develop reports based on the following breakdown:

- 2 High Complexity
- 2 Medium Complexity

Prior to the development of a report the Agency will approve report design specification documents that will be created jointly by the Agency and RedMark. The approved documents will be used as a basis for determining completion and approval of the reports. Development of each report cannot begin until agreement on each specification is complete.

A proven strategy that combines the use of the Accela Civic Platform Quick Queries, custom reports developed by RedMark that include run-time parameters to allow similar reports to be combined, and the development of other reports by the Agency after training, can ensure that all required reporting requirements are met.

In terms of specific output, the following will be executed for this deliverable:

- List of identified reports with assigned responsibility for specification and development
- Completed Report Specification Documents for each report assigned to RedMark

RedMark Responsibilities:

- Assist in determining level of effort for reports to assist with prioritization.
- Develop report specifications.

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark's request for information.
- Make available the appropriate key users and content experts to participate in the report specification.
- Provide information and data in the formats specified by RedMark that will be needed for agreement on the Deliverable.

Acceptance Criteria:

- Agreement on prioritized list of reports that will be developed by RedMark.
- Review and approval of individual Report Specifications documents. The Agency will not unreasonably withhold acceptance if the Agency requests changes to the reports specifications after the initial signoff of the specification by the Agency.
- Agency will have 5 business days to review the Report Specification Documents. If no changes or comments are requested within the 5 days, the Report Specification Documents are considered approved by the Agency.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 10: REPORT DEVELOPMENT

RedMark will develop custom documents/letters/reports per the specifications developed and approved in [Deliverable 9, Report Specifications](#). Changes to the report specifications after approval can negatively impact project progress and the overall schedule. Therefore, changes to the report specifications after approval requires an analysis by RedMark to determine the level of effort required, and if a change order would be required to complete the work.

In terms of specific output, the following will be executed for this deliverable:

- A total of 4 documents/letters/custom reports per the Report Specification Documents

RedMark Responsibilities:

- Provide timely and appropriate responses to Agency's request for information.
- Develop reports per specifications.
- Assist in the validation of the reports in test environment.

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark's request for information.
- Make available the appropriate key users and content experts to participate in the report development and validation activities.

- Request change order if changes to specifications are required.

Acceptance Criteria:

- Confirmation of report accuracy in the development or test environment per Report Specifications.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 11: ACCELA GIS CONFIGURATION

RedMark will install and configure Accela GIS to link and leverage existing Agency GIS information, including assistance with establishing the map service to be used in conjunction with Accela GIS. The following are the main objectives being pursued through the implementation of the Accela GIS:

- Look up permit information and parcel information from the Permitting system.
- View selection, location, and associated GIS information.
- Select one or more parcels and add new applications to the permit system.
- Auto-populate spatial attributes for a property in forms (including ACA).

During GIS installation, RedMark's technical staff will work with Agency IT staff to ensure that the components for hardware, software, database, network, and Internet are in place for the Accela GIS test and production environments. RedMark technical staff will validate the proper installation and configuration of the Accela GIS environment.

In terms of specific output, the following will be executed for this deliverable:

- Accela GIS installed on Agency server(s)
- Accela GIS Admin Training

RedMark Responsibilities:

- Install RedMark software and perform quality assurance checks on the configuration and performance based on acceptance criteria mutually developed by RedMark and the Agency.
- Demonstrate that the Accela GIS applications are operational in the Agency computing environment thus communicating with the Accela Civic Platform system.
- Assist the Agency in identifying and developing Proximity Alerts and Dynamic Themes
- Does not include external APO (XAPO).

Agency Responsibilities:

- Arrange for the availability of appropriate staff for the system installation, setup, testing, and quality assurance throughout the setup process.
- Order and procure necessary hardware, non-Accela systems software, and networking infrastructure as specified by RedMark.
- Provide people and physical resources based on the dates outlined in the project schedule.
- Prepare the hardware, software, and network in accordance with the specifications provided by RedMark.
- Provide RedMark with network access for remote installation and testing.
- Provide information and data in the formats specified by RedMark that will be needed for the GIS implementation.

Acceptance Criteria:

- Demonstration of operating Accela GIS in test environment.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 12: ACCELA CITIZEN ACCESS CONFIGURATION

This deliverable includes setup and configuration of Accela Citizen Access (ACA) on the Agency Dev site. RedMark will work with the Agency representatives to assess and implement Accela Citizen Access to extend certain aspects of the internal Accela Civic Platform configuration for use by the general public.

Features available for configuration include:

- Record Research
- Permit Application and Issuance / On-Line Payments
- License Renewals / On-Line Payments
- Inspection Request Entry
- Inspection Results Research
- Status tracking

In terms of specific output, the following will be executed for this deliverable:

- Accela Citizen Access Configuration Specifications Document (MS Word)
- Configuration of Online Record types in Accela Civic Platform
- Accela Citizen Access Admin Training

RedMark Responsibilities:

- Setup Accela Citizen Access in Dev environment.
- Assist agency in set up and validation of merchant account integration.
- Work with the Agency to determine which services to expose to the public via Accela Citizen Access.
- Create configuration specification for Accela Citizen Access based on analysis with the Agency.
- Configure the Online Record types defined in the System Configuration Document in Accela Citizen Access.

Agency Responsibilities:

- Obtain a merchant account, and deploy an internet-enabled payment engine.
- Validate that the configuration specification for Accela Citizen Access meets Agency requirements based on details from the Configuration phase of the project.
- Perform testing of all Online Record types for purposes of validating the configuration.

Acceptance Criteria:

- Accela Citizen Access Configuration Analysis Document provides details of all configuration elements based on Accela Civic Platform back office configuration.
- The base configuration of Accela Citizen Access is configured as documented in the approved Accela Citizen Access Configuration Specification Document.
- Demonstration of the operational Accela Citizen Access functionality per the specification document(s).
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

Acceptance Review Period:

- Five (5) business days

DELIVERABLE 13: ACCELA MOBILE OFFICE CONFIGURATION

RedMark will configure the Accela Mobile Office application. As part of this deliverable RedMark will perform the configuration tasks required to ensure Accela Mobile Office interfaces with Accela Civic Platform in both a test and production environment. Using Accela Mobile Office, an Agency inspector can perform activities such as:

- Result inspections/investigations in either store/forward or wireless mode
- Print reports in the field (if applicable – AMO reports are not included)

Analysis activities with the Agency will result in the baseline Mobile Office Configuration Specifications. Subsequently, RedMark's staff will extend base configuration of Accela Mobile Office per the Mobile Office Configuration Specifications.

In terms of specific output, the following will be executed for this deliverable:

- Demonstration of operation system per Accela Mobile Office Configuration Specifications Document
- Accela Mobile Office Admin Training

RedMark Responsibilities:

- Create configuration specifications for Accela Mobile Office based on analysis with the Agency.
- Configure Accela Mobile Office based on approved specifications.

Acceptance Criteria:

- The base configuration of Accela Mobile Office in the Development or Test environment is configured as documented in the Accela Mobile Office Configuration Specifications.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

Acceptance Review Period:

- Five (5) business days total

DELIVERABLE 14: ELECTRONIC DOCUMENT REVIEW CONFIGURATION

This deliverable is comprised of the activities that will enable the submission, review and markup of documents to work effectively given the Agency's configuration. RedMark will leverage stamps provided out-of-the box, or from its stock of stamps, and provide instruction available from Accela on the creation of stamps to the Agency. The Agency will be responsible for creating any additional stamps that will be applied through configuration. RedMark will also leverage buttons provided out of the box and provide instruction available from Accela on the creation of custom buttons with links. The Agency will be responsible for creating any buttons that will be applied through configuration. RedMark will work with the Agency to identify and review:

- Documents that will be submitted online through Accela Citizen Access and Accela Civic Platform as part of the review process.
- Agency workflows associated with the document review process.
- Requirements for workflow tasks | statuses | assignments for each role (e.g. intake personnel, plan reviewers, plan processors approvers, etc.) in support of Agency workflow.
- Versioning of documents submitted / reviewed.
- Process steps within the Agency's workflow associated with reviewing the plan.
- Requirements for notifications via email.
- Identify stamps to be used on submitted documents (if applicable).
- Identify buttons to be used to quickly access Web-based regulatory codes (if applicable).
- Information that will be exposed to the public via Accela Citizen Access.

In terms of specific output, the following will be executed for this deliverable:

- Configuration of Accela Electronic Document Review

RedMark Responsibilities:

- Install Accela Electronic Document Review on up to 2 client PC's and train the Agency so they can install on additional PC's.

Agency Responsibilities:

- The Agency will have installed .Net Framework 4.0 Client Profile and Adobe Acrobat Pro software. Adobe Acrobat Pro must be purchased and installed separately for each Agency user who will be interacting with Accela Electronic Document Review for plan review and markups.
- Make available the appropriate subject matter experts to provide needed information, participate in the analysis and verify the accuracy of the information provided.
- Creation of additional Adobe activities (stamps and buttons).
- Provide timely and appropriate responses to RedMark's request for information.

Acceptance Criteria:

- Demonstration of the operational Accela Electronic Document Review functionality.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C).

Acceptance Review Period:

- Five (5) business days

DELIVERABLE 15: ADMINISTRATIVE AND TECHNICAL TRAINING

RedMark will provide training for Agency staff that focuses on the administration, maintenance, and augmentation of its Accela Civic Platform configuration. Our aim at RedMark is to educate Agency resources on all aspects of Accela Civic Platform in an effort to ensure the Agency is self-sufficient. This allows the Agency to best react to changing requirements and ongoing maintenance, which can allow the Agency to be reactive and significantly reduce system maintenance costs over time.

In terms of specific output, the following will be executed for this deliverable:

- 1 Administrator Training – 2 to 3 days (remote or onsite)
- 1 Database Schema (report writing) Training – 4 hours (remote)
- 1 EMSE Basic (scripting) – 4 hours (remote)

RedMark Responsibilities:

- Coordinate with the Agency to define training schedule and logistics.
- Deliver training per the specific requirements listed above.

Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Provide suitable Agency facilities to accommodate various training classes.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:

- Execution of listed training courses.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 16: DAILY USER TRAINING

This Deliverable includes the Delivery by RedMark to Agency of 2 instances of the Daily User Training course (2 days onsite). Accela best practices have proven that class sizes no larger than 14 participants are more successful with students who meet the pre-requisites of the course. The RedMark Trainer has the right to modify the class size to ensure successful instruction with Agency agreement.

End User Training should be coupled with the Agency delivering supplementary user training to its staff using the core Use Cases documented in each System Configuration Document. RedMark recommends that Agency adopt the "80/20 rule" for training, focusing the majority of their training on the 80% of what the Agency normally does operationally. The recommended supplementary training conducted by the Agency can utilize business experts from each area to train on all aspects of their configuration. RedMark will deliver current training documentation in a format that can be used to customize the documentation. Documents delivered by RedMark to the Agency will be valid for the release that the Agency is trained. Documents delivered by RedMark may not be shared with any other agency or Company per the Non-Disclosure Agreement.

In terms of specific output, the following will be executed for this deliverable:

- 2 instances of Daily User Training (onsite only)

RedMark Responsibilities:

- Coordinate with the Agency to define training schedule and logistics.
- Provide 2 of Daily User Training.

Agency Responsibilities:

- Select and prepare the power-users who will be participating in the training and subsequently training end users.
- Arrange the time and qualified people for the training who are critical to the project success.
- Provide suitable Agency facilities to accommodate various training classes.
- Ensure that users are proficient in using PC's in a Windows environment as a prerequisite for the course.
- Ensure that users are familiar with use of standard Internet browsers as a prerequisite for the course.

Acceptance Criteria:

- Execution of 2 instances of the End User Training course to the Agency.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 17: USER ACCEPTANCE TESTING (UAT)

This deliverable is comprised of the assistance RedMark will provide to allow the Agency to develop and accept that the solution meets the requirements as documented in all the deliverables. RedMark will assist the Agency in the development, testing and validation of the solution and its readiness to be migrated to production for active use and will assist in transferring the solution and any required data from Support to Production.

RedMark will provide support for training, oversight, answering questions and addressing issues discovered in User Acceptance Testing. It should be noted that it is critical that the Agency devote ample time and resources to his effort to ensure that the system is operating per signed specifications and ready for the move to production. The testing effort will require a significant time investment by the Agency, and coordination of resources is critical. At this point in the implementation process, the Agency should test individual components of functionality of the solution (i.e., functional and/or unit testing), and also test to ensure that the interrelated parts of the Accela Civic Platform solution are operating properly (i.e., integration testing).

RedMark will provide assistance to the Agency as needed by providing User Acceptance Testing (UAT) support and facilitating completion of UAT. RedMark will address and rectify issues discovered during the UAT process as Agency staff executes testing activities. RedMark will work with the Agency to develop a test plan and deliver sample test scripts, as well as an issue log to track the progress of testing. It should be noted that RedMark will plan for a total of 2 weeks to complete this deliverable.

If the Agency does not devote adequate time and staffing to UAT in order to completely test the solution, RedMark may opt to postpone go-live at the Agency's expense. RedMark will work diligently with Agency to ensure this does not occur and provide several opportunities for the Agency to add additional staff and time to this effort before recommending a postponement or delay.

In terms of specific output, the following will be executed for this deliverable:

- Resolution of issues resulting from Agency User Acceptance Testing
- Fully tested system that is ready to move to production for go-live

RedMark Responsibilities:

- Provide recommendations on testing strategy and best practices.
- Provide assistance to Agency in the development of User Acceptance test scripts
- Lead the Agency in up to 2 weeks of User Acceptance testing effort and the validation of the system configuration and its readiness to be migrated to production for active use.
- Resolution of issues as a result of User Acceptance Testing activities.

Agency Responsibilities:

- Provide timely and appropriate responses to RedMark's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.
- With the assistance of RedMark, develop the User Acceptance test scripts.
- Utilize the use cases documented in each Configuration Document Deliverable as the basis for the acceptance of this Deliverable.

Acceptance Criteria:

- Completion of up to 2 weeks of UAT
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 18: PRODUCTION SUPPORT

Production date is defined as the official date in which Accela Civic Platform is deployed and moves from the test environment to Go-Live production for daily Agency usage. This date will be agreed to by both RedMark and the Agency at project inception. It may be altered only by change order agreed to by both parties. In the weeks prior to moving to Production, RedMark will assist in final data conversions, system validation, staff preparation assistance and training, and coordination of deployment.

In terms of specific output, the following will be executed for this deliverable:

- Deployment support prior to moving to Production
- Setup of Integration points in Production
- Final Conversion run during cutover
- Accela Civic Platform used in Production environment for Agency daily use

RedMark Responsibilities:

- Provide on-site resources to support the move to Production effort.
- With assistance from the Agency, lead the effort to transfer the system configuration and any required data from Support to Production.
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production.

Agency Responsibilities:

- Provide technical and functional user support for pre and post Production Planning, execution, and monitoring.
- Provide timely and appropriate responses to RedMark's request for information.
- Assist in the development of a Pre-Production checklist that details the critical tasks that must be accomplished prior to moving to Production.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.

Acceptance Criteria:

- Deployment support prior to moving to Production.
- Production system is first used by the Agency for daily use.
- Agency completion and execution of Deliverables Acceptance Form (Appendix C)

DELIVERABLE 19: POST DEPLOYMENT SUPPORT AND TRANSITION TO CRC

This deliverable is comprised of the post- Production support assistance that RedMark will provide to address issues and provide consultative advice immediately following the move to Production for daily use. RedMark will provide support for 3 weeks immediately following deployment (go-live).

RedMark will work with the Agency to identify and address issues identified during this period using a Post Production Issues List. This list will be comprised of issues related to the defined deliverables listed in this SOW, which will be addressed by RedMark, as well as any other issues that the Agency wishes to track (not RedMark Responsibility). Examples of issues the Agency is responsible for include training issues, functional changes beyond the scope of this Statement of Work, cosmetic changes, and procedures related to the use of Accela Civic Platform. Specifically, RedMark will not be developing or creating additional reports, conversions, interfaces, records types and workflow processes that were not included in the scope of this project.

At the end of the support period, RedMark will provide a final a final copy of the issue tracker to the customer and disable the list. Additionally a formal meeting will be scheduled with the Agency, RedMark Services Team, and Accela CRC for the purpose of transitioning support of future issues and question from the Agency to Accela CRC.

In terms of specific output, the following will be executed for this deliverable:

- 3 weeks of Post Deployment Support
- Finalized post production issues list
- Transition of Agency from Services team to Customer Resource Center for ongoing support

RedMark Responsibilities:

- Provide post-production support for RedMark developed configuration and components.
- Assist with the identification of issues for the Post Production Issues List.

- Assist with issues that may arise related to the deliverables in this SOW.
- Transfer ongoing support of the client and to the CRC to address any post Production issues that require remediation.

Agency Responsibilities:

- Provide technical and functional user support for post-production support and monitoring.
- Develop and maintain a Post Production Issues List.
- Provide timely and appropriate responses to RedMark's request for information.
- Make available the appropriate Agency key users and content experts to participate in user acceptance testing as defined and managed by Agency.

Acceptance Criteria:

- Execution of 3 weeks post-Production support.
- Official transfer from the RedMark Services project team to the Customer Resource Center (CRC).

(Rest of page intentionally left blank)

PAYMENT SCHEDULE

The table below represents the Services payments to be made during the project.
Table below may change as SOW is refined.

Deliverable #	Description	Amount
N/A	Due upon contract signature	N/A
1	Project Initiation	\$8,778.00
2	Accela Civic Platform System Setup	\$14,277.00
3	Transfer and Install Small Medium Government (SMG) Market Configuration	\$25,000.00
4	Additional Configuration	\$10,000.00
5	Address, Parcel, Owner (APO) Data Conversion	\$9,000.00
6	Historical Data Conversion	\$22,000.00
7	Payment Processor Interface	\$16,000.00
8	Business Process Validation and Automation	\$10,000.00
9	Report Specifications	\$4,000.00
10	Report Development	\$6,000.00
11	Accela GIS Configuration	\$2,500.00
12	Accela Citizen Access Configuration	\$2,500.00
13	Accela Mobile Office Configuration	\$2,500.00
14	Electronic Document Review Configuration	\$2,000.00
15	Administrative and Technical Training	\$3,500.00
16	Daily User Training	\$5,500.00
17	User Acceptance Testing (UAT)	\$4,500.00
18	Production Support	\$2,500.00
19	Post Deployment Support and Transition to CRC	\$4,290.00
N/A	Due after final Deliverable Acceptance	\$12,555.00
	PROFESSIONAL SERVICES	\$167,400.00
	Estimated Travel (up to 12 onsite trips)	included
	SERVICES + TRAVEL	\$167,400.00

EXPENSES

The overall fee listed in the Billing Terms section is inclusive of all expenses. Up to 12 onsite trips are included in this SOW.

If additional travel is necessary required, upon mutual agreement of both parties, travel, lodging, and transportation will be scheduled and paid for directly by the Agency at the request of RedMark.

CONTRACT SUM

The total amount payable under this Agreement is therefore \$167,400.00.

The estimated fees for this SOW are predicated on the timely completion of project milestones. However, should completion of milestones slip due to actions of Agency, and should this slippage result in material effort to RedMark in excess of the hours provided for in this document, RedMark will produce a change order at a rate of \$150.00 per hour for additional hours in support of the scope and deliverables contained herein. Any change order will need to be approved by both Agency and RedMark. Change orders will need to be approved within three business days of delivery to avoid a halt of work on the engagement.

PROJECTS PUT ON HOLD

It is understood that sometimes Agency priorities are revised requiring the Agency to place the Accela Civic Platform implementation on hold. The Agency must send a formal written request sent to RedMark in order to put the project on hold. A project can be on hold for up to 90 days without invoking the termination clause (see Services Agreement). After that time, RedMark can choose to cancel the rest of the Statement of Work. To finish the project will require a new Statement of Work at new pricing.

When a project is put on hold, at minimum, Accela will need to draft a Change Order to keep some of the Accela project manager's time engaged to monitor progress and to resource the project once it comes off hold. Other Change Order items may be needed as a result of the delay. When a project goes on hold, project resources will be re-deployed and RedMark will need a forty-five (45) calendar day notice to re-staff the project. Resumption of the project will be dependent upon RedMark resourcing timelines.

Should the Agency become non-responsive to RedMark communications for a term of 30 calendar days regarding continuance of the project work, RedMark can choose to cancel the remainder of the Statement of Work. To finish the project will require a new Statement of Work at new pricing at the current rates.

CHANGE ORDERS

In order to make a change to the scope of Professional Services in this SOW, Agency must submit a written request to RedMark specifying the proposed changes in detail. RedMark shall submit to Agency an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Professional Services ("Change Order"). RedMark shall continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees therefore. Any Change Order shall be agreed to by the parties in writing prior to implementation of the Change Order. If RedMark's effort changes due to changes in timing, roles, responsibilities, assumptions, scope, etc. or if additional support hours are required, a change order will be created that details these changes, and impact to project and cost (if any). Any change order shall be signed by Accela and Agency prior to commencing any activities defined in the change order. Standard blended rate for RedMark resources is \$150.00 per hour.

EXPIRATION

The scope and terms of this SOW must be executed as part of the Agency Services Agreement within sixty (60) calendar days of the date of this SOW. If the SOW is not executed then the current scope and terms can be renegotiated.

PROJECT ASSUMPTIONS

- Agency and RedMark will review their responsibilities before work begins to ensure that Services can be satisfactorily completed.
- Agency shall provide the necessary tools, accounts, and permissions that will enable RedMark to access the Agency's internal network for the purpose of remote installation and testing (if applicable for Agency hosted solutions). This access must be provided through industry standard tools such as Virtual Private Network

(VPN). Failure to provide this access in a timely fashion will result in a project delay. Such a delay will result in a Change Order.

- Agency agrees during the Initiation Phase of the project to assign a single designated approver for each major project deliverable. The designated approver will be responsible for overseeing and/or directly participating in the design and development, as well as the approval, of the deliverable. Agency may make changes to designated approvers with written notification to RedMark a minimum of one month before a deliverable is due.
- Agency will provide work space for RedMark Services for work completed on Agency premises.
- RedMark will implement the most current version of Accela Civic Platform at the time of the contract signing. If Agency chooses to upgrade the system, additional costs will be incurred and managed via a Change Order.
- Agency will maintain primary responsibility for the scheduling of Agency employees and facilities in support of project activities.
- Agency will ensure that RedMark resources have access to a Development or Test version of the 3rd party system for interface development. All interfaces will be developed against 1 (one), agreed upon version of the 3rd party system.
- If applicable, Agency will provide/purchase/acquire the appropriate hardware, software and infrastructure assets to support all required Accela software products in both support/testing and production environments as defined in the project schedule.
- If payment processing for Accela Citizen Access is included in this SOW, Agency will provide/purchase/acquire an online merchant account and all related hardware required by the merchant account provider for the handling of credit cards and/or checks.
- For Agency hosted solutions, Agency is responsible for proper site preparation, hardware, software, and network configuration in accordance with RedMark specifications.
- For Agency hosted solutions, RedMark will be responsible for implementing a functioning version of the application software at the Agency (assuming the Agency has installed the proper hardware, software, and networking devices).
- RedMark will provide the Agency with a Weekly Status Report that outlines the tasks completed during the prior week, the upcoming tasks that need to be completed during the following week, the resources needed to complete the tasks, a current version of the project plan, and a listing of any issues that may be placing the project at risk (e.g., issues that may delay the project or jeopardize one or more of the production dates).
- Agency will provide RedMark with access to test and development environments for each Agency system that requires integration with Accela Civic Platform.
- RedMark personnel will attend Agency executive steering committee meetings as needed.
- Agency has committed to the involvement of key resources and subject matter experts for ongoing participation in all project activities as defined in the project plan associated with this SOW.
- The project schedule is managed using Microsoft Project. Should any tasks slip behind schedule ten (10) business days, RedMark and Agency will escalate according to the Communication Plan in the Project Charter.

PROJECT RESOURCES AND LOCATION OF WORK

WORK LOCATION

Services contracted under this SOW may be performed remotely and/or at the Agency's on-site facilities (except where on-site services are specifically provided for in this SOW) as deemed appropriate and reasonable for the successful completion of the Services detailed herein.

AGENCY RESOURCES

Agency must fill the appropriate roles with the appropriate personnel to work together with the RedMark Engagement Team for these Services and that Agency will make available additional resources as needed for the Services to be successful. Agency roles can be filled by the same person. In addition, Agency will provide all necessary technical resources to make appropriate modifications within any Agency systems wishing to integrate with any Accela systems. These resources must be proficient in Agency coding/development environment and tools, to make the required changes to their software to enable integration and must be available during the timeframe of these Services. Agency roles include Sponsor, Project Manager, Technology Manager, and Business Lead(s) for each Division/department being implemented, Super User trainers, and others as appropriate.

Agency Resources	Description
Project Sponsor	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Ultimate responsibility for the success of the project, • Creating an environment that promotes project buy-in, • Driving the project through all levels of the agency, • High-level oversight throughout the duration of the project, • Serving as the primary escalation point to address project issues in a timely manner.
Project Manager	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Overall administration, coordination, communication, and decision-making associated with the implementation; • Planning, scheduling, coordinating and tracking the implementation with RedMark and across departments within the agency; • Ensuring that the project team stays focused, tasks are completed on schedule, and that the project stays on track.
Division/Departmental Business Leads	<p>A user representative for each affected department must be appointed to facilitate analysis and configuration and serve as a decision-making entity for that group. These critical appointments may well determine the success of the implementation for their respective areas. Responsibilities include:</p> <ul style="list-style-type: none"> • Attending requirements workshop sessions; • Willing and able to gather data and make decisions about business processes; • Assist in the creation of specifications for reports, interfaces & conversions • Review and test the system configuration; • Participating in the implementation of the Accela Civic Platform solution.
Division/Departmental Subject Matter Expert (SME)	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Being trained on the Accela Civic Platform system at a System Administration level;

	<ul style="list-style-type: none"> • Being fully engaged in the Business Analysis and system configuration activities; • Assist internal efforts towards the creation of reports, interfaces & conversions; • Assist in the review and testing of the system configuration; • Actively participate in the full implementation of the Accela Civic Platform solution.
Technical Lead	<p>Responsibilities include:</p> <ul style="list-style-type: none"> • Primary responsibility for the technical environment during the software implementation; • Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards; • Work with RedMark technical personnel during implementation; • Maintain test and production databases; • Perform day-to-day maintenance of the system and install maintenance releases; • Act as the primary technical resource for troubleshooting problems; • Establish and maintain backup, archival, and other customary maintenance and housekeeping activities.

REDMARK RESOURCES

RedMark will assign key Professional Services resources for this engagement with Agency. These individuals are well versed in the Accela Civic Platform application, and are well qualified to lead this effort. RedMark's Project Manager shall assume full responsibility for the coordination of this team and its interaction with key Agency resources assigned to the effort. The main roles are as follows:

RedMark Resources	Description
Project Executive	The Project Executive oversees the project's progress/direction and works with the Project Manager to ensure efficiency, consistency and quality in delivery of Accela implementations. The Project Executive actively participates in a project director/executive role. The Project Executive will meet with Agency Executives monthly or upon request throughout the duration of the project.
Project Manager	<p>The RedMark Project Manager is responsible for the overall project management and works directly with the client throughout all aspects of Accela implementations: from the initial scoping, planning, staffing to delivery. The Project Manager undertakes the project administration tasks including:</p> <ul style="list-style-type: none"> • Project plan management, • Change order management, • Issue log management and escalation, • Status reporting, • Project workspace management, • Resources management, • Work plan management, • Meetings management,

	<ul style="list-style-type: none"> • Project review with Project Executive. <p>In addition, the Project Manager will actively participate in leading the System Configuration Analysis sessions and will be responsible for the creation of the System Configuration Document.</p>
Senior Implementation Consultant	<p>The Senior Implementation Consultant assigned to the project will have major experience in the business process as well as the product functionality and is responsible for:</p> <ul style="list-style-type: none"> • Business analysis activities: Mapping the client's business processes and requirements to the functionality of Accela's products and the creation of solution design, • Leading system configuration activities, • Providing training/mentoring to agency staff, • Recommend industry best practices to agency to enhance business processes, • Guide agency on how best to configure the system based on past experiences and software expertise.
Implementation Consultant	<p>Implementation Consultant resources support the project and typically focus on the following tasks.</p> <ul style="list-style-type: none"> • The configuration of the system to match the System Configuration document. • Build activities within the project, such as conversion data mapping, creation of reports and interface specification.
Technical Consultant	<p>RedMark Technical Consultants are involved in all areas that require knowledge o server-side considerations and Accela add-on products such as:</p> <ul style="list-style-type: none"> • Application installation and setup (Accela Civic Platform, Accela GIS, Accela Mobile Office, and Accela Citizen Access), • Report definition and creation, • Event Manager Script definition and programming, • Database Conversions and data mapping assistance, • Interface specifications and development.
Training Consultant	<p>Training Consultants are responsible for Accela Training classes with assistance from Implementation consultants, depending on the nature of the specific project.</p>

ACCEPTANCE

The Services contracted for in this Statement of Work will be considered Accepted when all Deliverables defined in the Work Description Section have been accepted by Agency as defined for each Deliverable. Additionally, transition to Accela's Customer Service Center, CRC has been completed. The live system has been handed over to the CRC and the transfer of knowledge from the Project Team to the CRC has also been completed. All training has concluded and project documentation has been handed over to the CRC.

Accepted By: Village of Key Biscayne	Accepted By: RedMark
By:	By:
Print Name:	Print Name:
Title:	Title:
Date:	Date:

(Rest of page intentionally left blank)

APPENDIX A - ACCELA IMPLEMENTATION METHODOLOGY

RedMark will deliver its Services to the Agency by employing the methodology detailed in this section. This is a proven methodology that guides the project from inception to deployment, thereby increasing the chances of successfully implementing Accela software products. Project delivery through execution of this Implementation Life Cycle is described below.

IMPLEMENTATION LIFE CYCLE

Thorough execution of these six stages ensures that Accela customers receive high-quality services throughout the project engagement.

Figure 1 - Accela Methodology



As illustrated in the figure above, the stages of project delivery flow in linear direction, although many tasks run in parallel as appropriate to avoid unnecessary project delays. Each stage has pre-defined objectives, tasks and associated deliverables. Depending on the exact scope of the project, a full complement or subset of all available deliverables will be delivered through the services defined for the project. Employing this deliverables-based approach ensures that RedMark and the Agency understand the composition and 'downstream' impact of each project deliverable to ensure the project is delivered with quality and in a timely manner.

INITIATION

Initiation represents the first stage in the lifecycle. During the Initiation stage, project contracts and the SOW are finalized, project scope and objectives are reviewed, and project planning activities and deliverables are completed. In terms of specific deliverables, common output from the Initiation Phase is as follows:

- Project Charter,
- Baseline Project Plan,
- Project Status Report Template,
- Project SharePoint Site pre-loaded with baseline documentation,
- Project Initiation Meeting.

TO-BE ANALYSIS

To-Be Analysis is the second stage in the lifecycle. During the Analysis stage, RedMark reviews existing agency documentation, interviews agency staff, and conducts workshops to understand the "To-Be" vision of the Agency that can be executed with the aid of Accela Civic Platform. It is during this Phase that RedMark gains a deeper understanding of Agency processes and business rules; simultaneously, the Agency begins to gain a deeper understanding of the methodology and Accela Civic Platform capabilities. A key output of this Phase is the To-Be Analysis Document(s) which serve as the 'foundation' for configuration of Accela Civic Platform to support germane elements of the Agency "To-Be" vision. Supplementing the To-Be

Analysis Document(s) are all other configuration specifications documents related to data conversion, interfaces, reports, and event scripts.

SOLUTION FOUNDATION

Solution Foundation is the third stage in the lifecycle. It begins upon completion of Stage 2 and should be completed prior to the next stage, Build. During the Solution Foundation stage, Accela Civic Platform will be built to match the to-be processes agreed to in the Analysis stage. Essential to this effort is the configuration of the Record (Case, Application, Permit, Work Order, etc.) types that were agreed to during the Analysis phase. Configuration of in-scope record types is comprised of, but not limited to:

- User-defined fields (Application-Specific Information and Task-Specific Information),
- Workflows and statuses,
- Fee structures and rules,
- Inspection data.

BUILD

Build serves as the fourth stage in the lifecycle, and execution of this stage overlaps Configuration, but ends after Configuration is complete. During the Build stage, all defined elements during the Analysis stage beyond the Solution Foundation will be implemented. This includes conversions, event scripts, interfaces and reports. In terms of specific deliverables, common output from the Build Phase is as follows:

- Event Script Development,
- Report Specifications and Development,
- Data Conversion Specifications and Development,
- Interface Specifications and Development.

READINESS

Readiness is the fifth stage in the lifecycle. During the Readiness stage Accela Civic Platform is fully tested, errors are identified, documented and corrected. Additionally, the solution is prepared for deployment. In addition, system administrators and end users are trained so that all appropriate agency staff members are prepared to use and maintain the software once the move to production occurs. In terms of specific deliverables, common output from the Readiness Phase is as follows:

- User Acceptance Testing,
- End-User Training.

DEPLOY

Deploy is the sixth and final stage in the lifecycle. During the Deploy stage the applications are moved to production; all requisite pre-production activities are identified, tracked and completed, and post-production analysis and review is completed. Upon moving to production, the Accela Civic Platform applications are transitioned to the Accela Customer Resource Center ("CRC") for ongoing support. A formal transition will occur between the Services team and the CRC that instructs the agency on available communication channels (telephone, email, online tracking system) and use of the Accela knowledge base. Lastly, all documented issues or enhancement requests will be transitioned from the Services team to the Customer Resource Center. In terms of specific deliverables, common output from the Deploy Phase is as follows:

- Pre-Production Checklist Development, Tracking and Execution,
- Move to Production,

- Post Production Analysis,
- Formal Transition to the CRC for Ongoing Support

(Rest of page intentionally left blank)

APPENDIX B - DATA CONVERSION ASSUMPTIONS

The following information provides detail related to the scope of Accela's data conversion offerings. Due to the inherent complexity of conversion activities, it is critical to address and understand common questions and misconceptions. Any conversion activity or requirement not included in this section is considered out of scope, and may be addressed through a change order for RedMark services.

GENERAL INFORMATION AND REQUIREMENTS FOR HISTORICAL CONVERSIONS

- The standard data conversion includes the conversion of transactional data to the Accela Civic Platform database when a configured destination exists. In the event there is no destination for legacy transactional data then it will be required to be converted as best fits into another area of the configuration or excluded from the conversion effort.
- RedMark will perform unit testing of the conversion program including spot checks of the data within Accela Civic Platform in order to identify if data corruption issues exist. Extensive quality assurance of legacy/historical data by the agency is required in order to ensure accurate transfer of data.
- A completed, signed off, Solution Foundation must be available before RedMark will begin the data conversion mapping effort.
- Each data source is counted as an individual and separate data conversion effort, even if multiple historical data sources are populating the Accela Civic Platform.

DATA CONVERSION ASSUMPTIONS

- **"As-Is" Approach:** Conversion of transactional tables, Address/Parcel/Owner (APO) data, Professional License data is executed "As-is" into Accela Civic Platform. "As-is" means that the data will be transformed as mapped to existing configuration elements in Accela Civic Platform. The conversion process will not create configuration data or alter the mapped data when processed into Accela Civic Platform. Additionally this means if invalid, inaccurate, or incomplete data is provided, it will be loaded into Accela Civic Platform "As-Is". Invalid data may be rejected by the loading process and tools, in which case said data would not be loaded into or available to view on Accela Civic Platform. All data cleanup must occur prior to execution into Accela Civic Platform.
- **Accela Data Conversion Tools:** Data will be mapped and converted utilizing Accela's Extract, Translate and Load ("ETL") toolset. This will assist to ensure the accuracy of the mapping. The data mapping tool ensures that the legacy source to Accela Civic Platform solution is accurate and prevents data from failing to convert, while the execution tool can be used to consistently run conversion process and track statistics.
- **Acceptable Data Formats For Historical Conversion:** It is expected that the Conversion Source Data be provided in an Oracle 10g/11g or Microsoft SQL Server 2000/2005/2008 database format. In the event that the source is not in an acceptable format, RedMark will provide recommendations for transposing the data in the proper format.
- **Acceptable Data Formats For Reference Conversion:** It is expected that the Conversion Source Data be provided in Oracle 10g/11g, Microsoft SQL Server 2000/2005/2008, or pipe delimited flat file format. In the event that the source is not in an acceptable format, RedMark will provide recommendations for transposing the data in the proper format.
- **Documents:** Historical/Legacy data conversion does not include the conversion of attached documents. If conversion of documents is required, this will be priced as a separate conversion effort. If requested, the documents will be converted to the configured primary electronic document management system (EDMS). See [Standard Document Migration](#) for additional details. Documents Data Conversions are considered a separate and standalone conversion effort, and are therefore counted individually, even if the documents are part of another system that is being converted into Accela Civic Platform.

STANDARD DOCUMENT MIGRATION

The standard document conversion may be utilized to convert record/permit level attached electronic documents into the configured Accela Civic Platform EDMS systems. In the event a 3rd party EDMS is used by Accela Civic Platform, it is still possible to convert documents if the 3rd party interface supports the create method.

At a minimum the electronic document(s) to be converted must exist in a Microsoft Windows accessible file system (ex. NTFS, FAT32) and have the ability to identify the associated Record ID in order to be converted. In the event that the files exist in a database they must be extracted into a windows file system prior to be evaluated for conversion.

(Rest of page intentionally left blank)



APPENDIX C - SAMPLE DELIVERABLES ACCEPTANCE FORM

Please acknowledge acceptance by:

A

Sign and fax this document to:

RedMark Technologies, LLC.
YOUR NAME
YOUR TITLE

Tel:

Fax:

B

Email this document as an
attachment to:

YOUR EMAIL

OR

Date:	
Agency Name:	
Approving Agency Manager:	
RedMark Manager:	
Project Name / Code:	
Contract / Agreement #:	

Agency agrees that RedMark has successfully completed the following Deliverables:

Deliverable #	Source / Reference Details	
	Service Agreement	

Agency agrees that RedMark has successfully completed the Deliverables described above in accordance with the terms of the related Contract/Agreement.

APPROVALS:

Agency Name

Signature

Title

Date